

**CA-PMM****Project Name:** Fuel Taxes Automated Schedule Processing Update**OCIO Project #:** 0860-89**Department:** State Board of Equalization**Reporting Period:** From: To:**Team Member to Project  
Manager****Current Task Summary**

Task or Deliverable	Scheduled Completion Date	Actual Completion Date	Issues?
<b>Accomplished this week</b>			
<b>Planned/Scheduled Completion in Next Two Weeks</b>			
<b>Status Summary</b>	<b>Yes/No</b>	<b>Explanation</b>	
Will all assigned tasks be accomplished by their due date?			
Are there any planned tasks that won't be completed?			
Are there problems which affect your ability to accomplish assigned tasks?			
Do you plan to take time off that is not currently scheduled?			

**Status of Assigned Issues**

Issue Number	Description	Due Date	Status
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## Team Member to Project Manager


**CA-PMM****Project Name:** Fuel Taxes Automated Schedule Processing Update**OCIO Project #:** 0860-89**Department:** State Board of Equalization**Reporting Period:** From: 7/1/09 To: 9/30/09**Project Manager to Sponsor****Current Status Report**

Questions	Yes/No	Cause	Impact	Action Required
1. Were recent milestones completed on schedule?	Yes			
2. Were any key milestones or deliverables rescheduled?	No			
3. Was work done that was not planned?	No			
4. Were there any changes to scope?	No			
5. Were tasks added that were not originally estimated?	No			
6. Were any tasks or milestones removed?	No			
7. Were any scheduled tasks not started?	No			
8. Are there any new major issues?	No			
9. Are there any staffing problems?	No			

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Questions	Yes/No	Impact	Action Required
1. Will upcoming critical path milestones or deliverables be delayed?	No		
2. Do any key milestones or deliverables need to be rescheduled?	No		
3. Is there any unplanned work that needs to be done?	No		
4. Are there any expected or recommended changes to scope?	No		
5. Are there any tasks not originally estimated that will need to be added?	No		
6. Are there any tasks or milestones that should be removed from the plan?	No		
7. Are there any scheduled tasks whose start will likely be delayed?	No		
8. Are any major new issues foreseeable?	No		
9. Are any staffing problems anticipated?	No		

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## Project Manager to Sponsor

### Current Status and Accomplishments:

*Describe deliverables completed and milestones met during **this reporting period**.*

ASP Test Upload, Discrepancy Reporting Statistics and Tax Paid Transactions Report Subprojects

- Stabilization Completed

Add Taxpayer Activity Type (TAT) MJ – Jet Fuel

- Requirements Approved

### Project Milestones:

*List key milestones and their dates from the project schedule.*

Milestone	Target Date	Forecast Date	Status	Cause & Impact to Implementation Date	Date Completed
Physical Design Completed - Add Taxpayer Activity Type (TAT) MJ – Jet Fuel	10/29/09	10/29/09	On Target		

### Variances

Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or

	On Plan <5%	Caution 5-10%	Significant Variance >10%	Action Required
Schedule	X			
Milestones	X			
Deliverables	X			
Resources	X			
OneTime Cost	X			

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## Project Manager to Sponsor

Continuing Cost	<input checked="" type="checkbox"/>			
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## CA-PMM

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**Reporting Period:** From: To:

## Sponsor to Executive Committee

### Summary Milestones and Highlights

#### Project Milestones:

List key milestones and their dates from the project schedule. Explain in issues section if a milestone's status is behind.

Milestone	Target Date	Forecast Date	Status	If Delayed, Impact to Implementation Date	Date Completed

#### Variances

Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance".

\* Priority of schedule, scope, budget, and quality from Final Ranking established in the Priority Analysis

	On Plan <5%	Caution 5-10%	Significant Variance >10%	Action Required
Schedule	X			
Milestones	X			
Deliverables	X			
Resources	X			
One Time Cost	X			
Continuing Cost	X			

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Committee****Monitoring Vital Signs Scorecard**

Vital Sign	Variance	Value	Your Score	Score Justification
1. Customer Buy-In	High Degree of Buy-In	0	0	Green
	Medium Degree of Buy-In	1		
	Low Degree of Buy-In	2		
2. Technology Viability	Strong Viability	0	0	Green
	Medium Viability	1		
	Weak Viability	2		
3. Status of the Critical Path (delay)	<5%	0	0	Green
	5% to 10%	1		
	>10%	2		
4. Cost-to-Date vs. Estimated Cost-to-Date (higher)	<5%	0	0	Green
	5% to 10%	1		
	>10%	2		
5. High-Probability, High-Impact Risks	0 to 3	0	0	Green
	4 to 6	1		
	>6	2		
6. Unresolved Issues (on time resolution)	On time	0	0	Green
	Late with no impact	1		
	Late impacting the critical path	2		
7. Sponsorship Commitment	Fully engaged	0	0	Green
	Partially engaged	1		
	Inadequate engagement	2		
8. Strategy Alignment	Strong alignment	0	0	Green
	Partial alignment	1		
	Weak or no alignment	2		
9. Value-to-Business	Strong	0	0	Green
	Medium	1		



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	Weak	2	
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10. Vendor Viability (provide rationale for the rating in the field following the scorecard)	Strong	0	0	Green	
	Medium	1			
	Weak	2			
11. Milestone Hit Rate (rate of achievement as planned)	>90% on time	0	0	Green	
	80-90% on time	1			
	<80% on time	2			
12. Deliverable Hit Rate (rate of production as planned)	>90% on time	0	0	Green	
	80-90% on time	1			
	<80% on time	2			
13. Actual vs. Planned Resources	>90% assigned and available	0	0	Green	
	80-90% assigned and available	1			
	<80% assigned and available	2			
14. Overtime Utilization (% of effort that is overtime)	<15%	0	0	Green	
	15-25%	1			
	>25%	2			
15. Team Effectiveness	Highly Effective	0	0	Green	
	Moderately Effective	1			
	Ineffective	2			
<b>Total</b>			<b>0</b>	<b>G</b>	

Green = 0 - 8

Yellow = 9 - 19

Red = 20+

**Vendor Viability Rating Rationale**

Vendor has provided three Senior Programmer analyst consultants that augment the project team. All three are very technically skilled and provide p